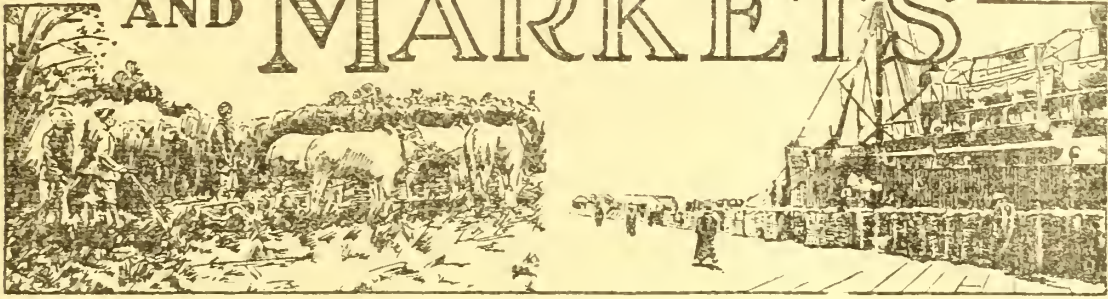


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FOREIGN CROPS AND MARKETS



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FEATURE ARTICLE

PROGRESS OF COLONIAL COTTON IN AFRICA

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WASHINGTON, D.C.

L A T E C A R L E S

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Argentine wheat crop condition generally better than month ago. Weather less favorable for flaxseed. (International Institute of Agriculture, Rome, July 20, 1933.)

Polish crop conditions as of July 5 improved over a month earlier. All grains and potatoes in above average condition. (International Institute of Agriculture, July 21, 1933.)

German total lard imports June 1933 reached only 7,937,000 pounds. Figure is one of smallest in recent years and little more than one-fourth of the May imports. Latter reached more than 34,000,000 pounds, despite advanced duty rates. Import duties were again raised effective July 19 to the equivalent of about 15.7 cents per pound. See statement on page 75.

London wool sales closing with tone of market easier, but values still from 10 to 20 percent higher than those at closing of previous series. Merino offerings were light but of excellent quality at the closing, with crossbred offerings heavy. Bradford was chief buyer. (Agricultural Attache Foley, London, July 21, 1933.)

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CROP AND MARKET PROSPECTS

BREAD GRAINSSummary of recent bread grain information

Wheat production estimates received during the past week indicate a total crop in 17 Northern Hemisphere countries 12.2 percent below 1932 figures. The Australian wheat acreage for 1933-34 is placed at 14,500,000 acres against 15,171,000 acres in 1932-33, according to the International Institute of Agriculture at Rome.

A reorganized system of German grain import permits against grain exports is the outstanding market development of the week. From now to December 1, wheat may be imported duty free against equal quantities of wheat exported. Barley and corn may be imported duty free against exports of rye. The Berlin office of the Foreign Agricultural Service anticipates that under the new system Germany may report no net grain imports for 1933-34. See page 70 for details. The German Agricultural Council reports total winter wheat stocks on farms at 12,324,000 bushels as of June 15, 1933, against 4,853,000 bushels a year earlier. Rye stocks on the 1933 date stood at 25,072,000 bushels against 11,677,000 bushels on June 15, 1932.

Italian regulations now require a milling quota of 99 percent for all domestic wheats, effective July 16. Hungarian wheat farmers are getting a production bounty this season of 3 pengo per quintal (20.4 cents per bushel) against 4 pengo (27.2 cents) last season, basis of current exchange rates. Total world wheat shipments for the first week of the 1933-34 season were about the same as a year earlier, with larger shipments from Argentina offsetting reductions in the movement from all other exporting countries.

World wheat production

Estimates of 1933 wheat production for the 17 countries reported up to June 17, amounted to 1,645,570,000 bushels as compared with 1,874,884,000 bushels in 1932. Although the German wheat crop for 1933 was officially estimated at 185,921,000 bushels, or an increase of 2,094,000 bushels over last year's crop, local reports were less favorable, and a smaller crop than that of 1932 is probable, according to a radio message from Assistant Agricultural Commissioner Christy at Berlin. Grain prospects in the U.S.S.R. are said to be better than last year and above average. Farmers and local authorities are still being accused of underestimating the yield in spite of measures taken to stop this practice. Rains were hindering the harvest in the south.

CROP AND MARKET PROSPECTS, CONT'D

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Current changes in wheat production estimates

Country	Reported up to July 10	Reported up to July 17
	<u>1,000 bushels</u>	<u>1,000 bushels</u>
12 countries previously reported	1,192,593	
Tunis (revised).....	11,574	10,288
Egypt (revised).....	38,948	39,940
Japan (revised).....	38,227	40,472
Rumania.....		94,798
Germany.....		a/ 185,921
Hungary.....		75,289
Netherlands.....		14,183
Turkey.....		80,835
17 countries reporting.....		1,645,570

Official sources. a/ This figure is larger than the estimate made by the Berlin office of the Foreign Agricultural Service.

Berlin office makes European acreage and production estimates

In his report covering the continental European wheat market situation for June, Mr. Christy submitted estimates of wheat acreage totaling 55,449,000 acres for 1933 in 19 deficit countries as compared with 54,804,000 acres in 1932. In spite of this slight increase in area based on official data for harvested acreage where possible, supplemented by estimates of the Berlin office, it was thought that prolonged dryness and cold weather had injured the crop to such an extent that production in 1933 would not equal that of 1932. Production in the 19 countries cited, exclusive of the Danube surplus countries, was placed at 1,107,371,000 bushels. All estimates entering that total were made by the Berlin office of the Foreign Agricultural Service. The figure is 9.0 percent below the comparable figure for 1932 and 4.4 percent above the five-year average for 1928-1932. Unusually fine weather might bring the crop up to that of 1932, but under normal weather conditions, Mr. Christy thought a reduction ^{might} be expected. See production estimates, page 90.

Crop conditions.Canada

Crop conditions in the prairie provinces of Canada did not change materially during the past week, according to a telegram dated July 18, from the Dominion Bureau of Statistics at Ottawa. Light rains fell, but

CROP AND MARKET PROSPECTS, CONT'D

general and heavy rains were greatly needed. The hot dry weather of June caused the wheat to mature early over wide areas, resulting in short thin stands and small heads. Harvesting will be difficult, because the wheat plants did not stool properly. In the southern half of Manitoba, the yield will be light; in the northern sections, where moisture was more adequate, crops ranged from fair to good. In Saskatchewan, poor crops were reported in the southwestern, west central, and parts of the south central areas, due to drought and heat damage; in other areas, they were fair to good. Crops in southern Alberta were suffering from want of rain, but conditions in the northern part of the province were favorable, and the outlook was promising. Some hail damage was reported in Manitoba and Saskatchewan.

Europe

Official crop conditions in Austria on June 30, as reported by Mr. Christy were above average for winter wheat and winter rye. The official figures for Czechoslovakia, as of July 1, were also above average. Improvement, due to rain the last of June, was noted, but growth was still delayed. In France some heat damage was feared, although conditions were favorable.

Southern Hemisphere

Frosty weather and generally satisfactory crops were reported for Argentina. Conditions in Australia, according to a cable from the International Institute of Agriculture at Rome, were varied. In Western Australia and Victoria, aspects were favorable; germination was irregular in New South Wales, with outlook unfavorable; and the weather was unsatisfactory in South Australia, on account of lack of rain.

European market conditions

Wheat markets in Netherlands and Belgium were active during the week ended July 13, large business, chiefly with Argentina, being reported according to Mr. Christy. Wheat farmers in France were withholding until July 15, when the minimum price would become effective, so markets were irregular. Limited business was reported in Austria. In Germany, increased offers were made due to a resumption of futures quotations. Mills were conservative, however, following considerable purchases on the coast and in the Rhine country.

France and Algeria continue limitations on free Moroccan wheat

France and Algeria will accept only 6,064,000 bushels of bread wheat from French Morocco duty free from June 1, 1933 to May 31, 1934, according to Walter Bauer, of the Foreign Agricultural Service office at Marseille,

CROP AND MARKET PROSPECTS, CONT'D

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France. Free imports of durum wheat from the same area are limited to 550,000 bushels, and durum flour to 67,500 barrels of 196 pounds. The figures cited are those which applied during the year ended May 31, 1933 and indications are that they are intended to apply also up to May 31, 1937. This year a new departure is made in allocating definite import quantities of wheat during the season, as follows:

<u>Period of import</u> <u>1933-34</u>	<u>Bread wheat</u> <u>Bushels</u>	<u>Durum wheat</u> <u>Bushels</u>
June 1 - August 31	2,352,000	220,000
Sept. 1 - Nov. 30	1,856,000	165,000
Dec. 1 - May 31	<u>1,856,000</u>	<u>165,000</u>
Total	6,064,000	550,000

The above contingents may be exceeded by 2 percent. The order embodying them also forbids shipments by sea to Algeria during the June-August period. There is some question as to why the first allotment is so large when that period coincides with the French harvest period. These regulations, however, were drawn before the coming into effect of the French minimum price law for wheat. The minimum price is 115 francs per 100 kilos (\$1.23 per bushel at par of exchange), beginning July 15, to be increased by 5 francs (5.33 cents) every 3 months up to 130 francs (\$1.39). Despite the low wheat prices prevailing in France after the 1932 harvest, the 1932-33 contingent for Morocco was practically filled before the end of May 1933.

Germany revises grain import certificate system

The announcement of the German grain protection measures effective July 15 continues the operation of the so-called exchange system, which has been in effect during the last two years, according to cabled advices from the Berlin office of the Foreign Agricultural Service. This scheme provides that for the exports of cereals within specified periods of time, certificates shall be issued which would entitle the holders to import corresponding quantities of similar or other specified cereals, duty-free at a reduced rate of duty. In this manner imports of foreign grain supplies are offset by exports, while imports in excess of exports are restricted by high or even prohibitive tariff duties.

Under the exchange system for the year 1933-34, certificates on exports prior to December 1, 1933 will entitle the holders to import similar quantities free of duty as follows: For wheat exports, wheat may be imported; for rye exports, feed barley and corn may be imported. Imports of feed

CROP AND MARKET PROSPECTS, CONT'D

barley and corn also will be permitted in exchange for exports of oats during this period but at a reduced rate of duty. The import duty on feed barley and corn will be 20 reichsmarks per metric ton, or 14.9 and 17.4 cents per bushel respectively at the current rate of exchange. The basic tariff rate for feed barley is 180 marks per metric ton or \$1.34 per bushel at the current rate of exchange. Corn imports are subject to a special corn monopoly which operated in effect in such a manner as to circumvent the low rate of duty of 25 marks per metric ton or 21.7 cents per bushel, fixed in the commercial treaty with Yugoslavia.

For the period December 1 to January 31 a similar arrangement for the exchange plan will prevail as prior to December 1, except that imports of cereals instead of being admitted free will be dutiable at reduced tariff rates: Wheat at 7 1/2 marks per metric ton or 7 cents per bushel instead of 250 marks per metric ton or \$2.33 per bushel; feed barley and corn at 5 marks per metric ton or 3.7 and 4.3 cents per bushel respectively when imported in exchange for rye; 25 marks per metric ton or 18.6 and 21.7 cents per bushel respectively when imported in exchange for oats. Imports of grain to replace flour exports are permitted for the entire season duty free or at a low rate of duty. Provision is also made in the new Government measure for the financing of grain storage. Conversions have been made at current rates of exchange.

FEED GRAINS

Summary of recent feed grain information

The condition of both the barley and oats crops in Canada at the end of June was 84 percent of the long-time average on account of damage from drought. In Austria the condition of the barley and oats crops at the beginning of July was a little above average, while their condition in Czechoslovakia was somewhat below average and considerably below that of last year. The first estimate of the 1933 corn area in Canada is 134,000 acres compared with 130,000 acres planted last year. Corn prices in the United States and Argentina continued to increase during the week ended July 15. For tables showing feed grain trade and prices, see page 92.

The 1933 barley production in 16 countries so far reported, which last year accounted for 60 percent of the estimated Northern Hemisphere total, exclusive of Russia and China, amounts to 801,043,000 bushels, a decrease of more than 17 percent from the production in those countries last year. The first estimate of the barley crop in Germany is 145,550,000 bushels, which is more than 1 percent below the production of last year,

CROP AND MARKET PROSPECTS, CONT'D

but is slightly above the average of the past five years. Farm stocks of spring barley in Germany were placed at 4,521,000 bushels on June 15, 1933, against 5,306,000 bushels a year earlier. The first estimate of the crop in the Netherlands is about 15 percent below the production of last year, and is the smallest harvest since 1917. The latest official estimate of the 1933 barley production in Hungary shows a decrease of 6 percent. The Rumanian crop is up about 18 percent while the Egyptian crop is down 23.5 percent. The total harvest in the European countries so far reported is 6 percent below that of last year.

The 1933 oats production in 13 countries reported, which in 1932 accounted for about 54 percent of the estimated Northern Hemisphere total excluding Russia and China, amounts to 1,352,572,000 bushels, or a decrease of 30 percent from the production in the same countries last year. The first estimate of the oats crop in Germany is 424,730,000 bushels, which is a decrease of more than 7 percent from the harvest of last year, and is more than 6 percent below the past five-year average. Farm stocks of oats in Germany on June 15, 1933, stood at 75,596,000 bushels against 56,855,000 bushels a year ago. The first estimate of the crop in the Netherlands indicates the smallest crop since 1912. Latest official estimates place the oats crops of Hungary and Rumania 12 percent below and 10 percent above last year's crops, respectively. The total production in the European countries reported is nearly 8 percent below that of last year.

Danube Basin feed grain export surpluses

The total exportable surplus from the 1933 barley crop in the Danube Basin, including the marketable carry-over from the 1932 crop, is estimated by Assistant Agricultural Commissioner Gibbs at Belgrade at 50,912,000 bushels. Last year the exportable surplus was 31,576,000 bushels, from which 25,393,000 bushels were exported up to July 1, 1933, leaving 6,283,000 bushels still available for export on that date. The total exportable surpluses of corn and oats for the 1933-34 season are estimated by Mr. Gibbs at 64,957,000 bushels and 3,100,000 bushels, respectively, compared with export surpluses of 102,160,000 bushels and 4,650,000 bushels from the 1932-33 crops. On July 1, 1933, there were 20,684,000 bushels of corn and 1,385,000 bushels of oats still available for export in the Danube Basin.

During the month of June barley prices declined in all the Danube countries except Yugoslavia. Oats prices remained practically on the same level except in Bulgaria, where stocks were depleted. Corn prices decreased in Rumania, with a decrease in demand. In Yugoslavia corn prices increased slightly, and in Hungary they increased materially on account of larger demands for export made possible by a French-Hungarian and by a Czechoslovak-Hungarian barter agreement, according to Mr. Gibbs.

CROP AND MARKET PROSPECTS, CONT'D

COTTON

Egyptian cotton area increased sharply

The area planted to cotton for the 1933-34 harvest in Egypt is estimated at 1,873,000 acres, an increase of 65 percent over the 1,135,262 acres harvested in 1932-33, according to a cable from the International Institute of Agriculture in Rome. An increase was predicted early in the season owing to the new government ruling allowing farmers to plant as high as 50 percent of their cultivable area to cotton, and also to their inability last season to sell their increased crops of cereals. Increased production is encouraged generally since the prosperity of the country depends largely upon the cotton crop, for which there is ready sale. (See "Foreign Crops and Markets", April 24, 1933, p.452.)

Larger crop seen for China

Indications are for a Chinese commercial cotton crop this year 10 to 15 percent larger than in 1932, according to a radiogram from Agricultural Commissioner Dawson at Shanghai, quoting preliminary advices. Planting conditions favored a larger acreage to a considerable extent, but the growing crop was handicapped in the early stages by rain and cool weather, especially in the Yangtze Valley. Mid-July stocks of cotton from all sources showed a decrease below a year ago, but purchases of foreign cotton are small owing to price uncertainties in connection with the larger domestic crop; the generally poor financial and industrial situation, and the recent negotiations for an American loan to purchase cotton. Shanghai stocks of American cotton on June 30 stood at 70,322 bales. Arrivals of American cotton at Shanghai in the period October-June 1932-33 reached 231,825 bales against 883,286 bales in the corresponding 1931-32 period. Arrivals of Indian cotton in the 1932-33 period also were smaller.

It is estimated that Chinese-owned mills are now operating at about 70 percent of capacity, with Japanese-owned mills on a 75-percent schedule. There is some indication of further curtailment in Chinese mills, but no definite agreement had been reached up to July 14. Shanghai yarn stocks on that date showed a slight decrease, with the demand for yarn showing no appreciable improvement. Yarn prices continue at an unfavorable level with respect to cotton prices. The piece goods market was quiet during the month ended July 14. The quiet tone was somewhat seasonal, but clearances were poor, with demand light from up-country points.

European textile activity continues to improve

The improvement noted in the continental European textile situation in recent months was maintained and even improved into July, according to mailed and cabled reports from Assistant Agricultural Commissioner D. F.

CROP AND MARKET PROSPECTS, CONT'D

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Christy at Berlin. The continued advance in raw cotton prices during June stimulated raw cotton buying. Developments likewise were favorable in new sales of cotton yarn and cloth over a large part of the Continent. New sales by cotton spinners of yarn to weavers as well as to knitting and hosiery mills continued satisfactory in both Germany and western Europe, but Italy again complained of declining commitments. Sales by weavers and knitting and hosiery mills likewise were well sustained into July in both Germany and France, which maintenance of seasonal increases were reported from other central European countries. Spinner buying of raw cotton, however, was somewhat less active in most continental countries toward the end of June when general uncertainty and pessimism regarding probable results of the London Economic Conference checked commercial interest.

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FRUIT, VEGETABLES AND NUTS

British prune market firm; European production increased

The London demand for spot California prunes has been well maintained, according to cabled advices of July 17 from Agricultural Attache Foley at London. Values remained generally firm but quotations for shipment have shown considerable daily fluctuation in keeping with the exchange rates. Demand has been steady for spot goods of all sizes. The forward position was unchanged, with a tendency toward greater firmness. New crop prunes were not generally quoted, but indications were for prices above spot parity. Total prune stocks in London on June 30 last stood at 1,250 short tons against 1,435 short tons last year and 1,136 short tons on June 30, 1931. The 1933 prune crop in France is now estimated at 10,000 short tons against 2,500 short tons for 1932, according to a cable of July 17 from Agricultural Commissioner Nielsen at Marseille. He quotes Agricultural Attache Michael at Belgrade as reporting that the Yugoslav dried prune output of 1933 is now expected to be equal or above the 29,000 short tons produced in 1932.

Smaller Mediterranean raisin crops; Greek currants down

Combined raisin crops in the Valencia and Malaga districts of Spain and in Greece and Turkey now stand at 102,700 short tons against 117,300 short tons for 1932, according to cabled advices from Agricultural Commissioner N. I. Nielsen at Marseille, France. All reported regions show declines below last year except those parts of Greece producing Sultanias and Rosakias. In both Valencia and Malaga the raisin crops are 30 percent below last year's figures. Sultanias in Smyrna stand 14.22 percent below a year ago. Mid-July stocks of old crop raisins were negligible except in Smyrna, where 1,100 short tons were reported. June exports of raisins

CROP AND MARKET PROSPECTS, CONT'D

this year were of no importance except from the Smyrna region, which exported 4,433 short tons against 199 short tons in June 1932. Smyrna exports of raisins this season to June 30 reached 65,506 short tons against 27,481 short tons for the same period of last season. The Smyrna market has been active, with prices somewhat stronger.

The Greek crop of 1933 currants is placed 3.4 percent below that of 1932, Mr. Nielsen reports. A considerable volume of old crop stocks is on hand. June 1933 exports of currants reached 3,019 short tons against 3,054 short tons in June 1932. For the present season to June 30, exports of currants reached 74,649 short tons against 169,728 short tons in the same period of the preceding season. See raisin and currant production table, page 93.

LIVESTOCK, MEAT AND WOOL

Germany again raises lard duty

Effective July 19, the German import duty on lard was advanced another 25 marks per 100 kilos to 100 marks, equivalent to about 15.7 cents per pound at current exchange rates, according to cabled advices from the Berlin office of the Foreign Agricultural Service. The new rate also applies to oleo oil and tallow. This is the second increase since February 18, when the rate was advanced to 50 marks per 100 kilos, equivalent at that time to 5.4 cents per pound. Despite the advanced rates, lard imports continued at a substantial rate during April, May and June, a situation which is not in keeping with the official Germany policy of protection to domestic producers of animal fats. The new decree also raises the duty on non-contingent bacon to 30 marks (9.3 cents per pound) from 36 marks per 100 kilos.

Britain grants larger cured pork import quota to United States

Bacon and ham import allotments totaling 6,944,000 pounds monthly have been announced for the United States by Great Britain, according to Meat Specialist H. E. Reed at London. The new quota is effective for the month ended July 22 and for each month thereafter with certain qualifications until the coming into effect of new quotas in connection with the British hog production control plan now under consideration. The new allotment is a combination of a basic allotment of bacon and ham together, plus a so-called "seasonal allotment" of ham alone. Since last March the basic allotment has been reduced each month by about 2.5 percent, in keeping with the general agreement to that effect with all countries shipping cured pork to British markets. In April, May and June, however, the United States was granted a special "seasonal allotment" for ham of 1,400,000 pounds. Poland was granted a similar but smaller allotment.

CROP AND MARKET PROSPECTS, CONT'D

For July and August, the United States seasonal allotment was increased sufficiently to produce the total allotment indicated above. After the month ended August 22, the 2.5 percent monthly reduction will be suspended. It should be emphasized, however, that the allotments outlined are in effect only until the application of the scheme now under consideration for the protection of the British pork industry. If that scheme is delayed beyond the summer ham utilization season, it is probable that the so-called seasonal allotment of ham will be scaled down.

The United States also has a special agreement with Great Britain for additional ham imports under specified price conditions. This agreement admits of a possible maximum additional monthly ham import of 1,042,000 pounds, representing 15 percent of the total cured pork allotment of 6,944,000 pounds now in effect. The price allotment for ham is fixed by agreement periodically in connection with the sterling quotations on ham and the prevailing dollar exchange rate. The minimum sterling price at which the price allotment may be granted is 68 sh. 3 d per cwt. (112 lbs.). The American price minimum is placed at \$14.00 per 100 pounds, at or above which American shippers may draw upon the extra contingent. Since July 7, ham has been bringing more than 80 shillings per cwt. at Liverpool, basis of importer to wholesaler transactions, and the dollar equivalent has risen from \$14.47 to \$16.65 per 100 pounds.

Since the quota system was established late in 1932, less than 1,000,000 pounds of bacon have been imported monthly under the United States allotment. Of the 6,944,000 pounds of cured pork now established as a regular monthly quota for the United States, therefore, probably 5,944,000 pounds can be regarded as representing ham. Adding the maximum extra amount allowed under certain price conditions as outlined above, there appears to be a possible total monthly ham allotment of 6,986,000 pounds. Ham imports from the United States during the calendar month of May 1933 reached 6,953,000 against 6,104,000 pounds in May 1932.

UNITED KINGDOM: Bacon and ham import allotments to the United States, months ended on the 22nd day, January to August, 1933

Item	Jan.	Feb.	March	April	May	June	July	Aug.
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
Bacon & ham.	4,480	4,480	5,768	4,250	4,144	4,032	3,931	3,830
Seasonal ham allotment..				1,400	1,400	1,400	a/3,013	a/3,114
Total..				b/5,650	5,544	5,432	6,944	6,944

a/ Allotment is subject to additional price contingent not exceeding 15 percent of total bacon and ham allotment. b/ Original combined allotment was 5,300,000 pounds.

CROP AND MARKET PROSPECTS, CONT'D

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Drought is reducing South African wool prospects

In view of the drought now in effect in the Union of South Africa, a reduction of 5 to 10 per cent from 1932-33 figures may appear in the 1933-34 wool clip, according to Agricultural Attache C. C. Taylor at Pretoria. The 1932-33 clip is placed at 298,000,000 pounds against 306,000,000 pounds in 1931-32. At the opening of the 1933-34 season on July 1, more of the principal wool areas were declared drought-stricken than in any other year during the period 1926-1933. The result has been to limit seriously the pasture area capable of supporting extra numbers of sheep shipped from stricken areas, and material losses are viewed as inevitable. In addition to sheep losses, drought causes lower grade wool through starvation-weakened fibers. Rail receipts of wool at all Union ports reached 309,245,000 pounds for the period July 1 - June 2 1932-33 against 298,100,000 pounds for the corresponding 1931-32 period. Exports for the same two periods were 313,904,000 pounds and 281,451,000 pounds respectively, largely to continental Europe, June 1, 1933 port stocks of unsold wool were only about 1/8 the volume of a year earlier.

British wool market active

A brisk market has marked the current London Wool Sales, according to cabled advices from Wool Specialist H. E. Reed at London. Prices have remained generally firm, with Bradford as chief buyer and Germany second. French interest has been quiet. The United States is reported as interested, but handicapped by prevailing exchange rates.

Reviewing the British wool trade for the month ended July 7, Mr. Reed notes the continued sharp upward price trend in wool and semi-manufactures. The movement has remained based on the firm statistical position of raw wools, with American domestic price movements having considerable influence. The more active British trade has been supplemented by a broader American inquiry for matchings and suitable wools. Some doubt is expressed concerning the duration of the current interest in wool, however, Future American operations may have considerable influence.

The sharp rise in wool prices has not been accompanied by any marked increase in purchasing power among British consumers aside from a small decline in unemployment. Unusually good seasonal weather has stimulated English retail sales, but it is emphasized that current sales are of goods made and bought at prices considerably lower than those prevailing at present. On the other hand, the strong statistical position of wool has improved further, and some trade circles see an Australian 1933-34 wool clip smaller than is now anticipated.

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THE PROGRESS OF COLONIAL COTTON IN AFRICA a/

Post-war efforts of European countries to promote cotton production in their African possessions and Empire areas carried figures upward through 1928-29. In that year the indicated African crop outside of Egypt was a little short of 500,000 bales of 478 pounds net. During most of the years indicated, prices were generally favorable to new cotton enterprises. From 1930 to 1933, however, interest lagged except where a substantial amount of government aid has been forthcoming. British interests cover the bulk of the colonial cotton projects in Africa, with the Empire Cotton Growing Corporation and the Sudan Plantation Syndicate as the outstanding operators. French areas rank next, with Belgian, Portuguese and Italian holdings following in the order named. All of those countries control areas of potential cotton production, particularly with respect to soil and climate. Disease resistant varieties and insect pest controls are being developed, but much remains to be done along those lines and in the field of educating native labor.

Incomplete figures suggest that the total 1931-32 colonial African cotton crop reached about 407,000 bales of 478 pounds net, against about 431,000 bales in 1928-29. The 1928-29 season was the best one so far reported, with a total of 431,000 bales. About half of the 1931-32 figure is accounted for by improved yields for that season in the Sudan on a reduced acreage. The 1932-33 acreage in the Sudan has been reduced further to the lowest level since 1928-29. In the 1929-30 season, the last for which complete figures are available, a small Sudan crop represented 33 percent of the total reported African crop outside of Egypt. Low prices and plant disease have forced acreage cuts in the Sudan, but the important government stake in the cotton enterprise suggests the continuation of fairly large-scale operations. In Uganda also, which in 1929-30 produced 26 percent of the total colonial African crop, production advanced in 1931-32 but fell short of the record set in 1928-29, and indications are for smaller operations in 1932-33.

British African areas, of which Sudan and Uganda are the leaders, accounted for about 76 percent of the total colonial or Empire crop grown in 1929-30. In 1924-25, when the several interested countries first began to see substantial results from fostering cotton, British interests represented 80 percent of the total. Twelve percent of the 1929-30 crop was grown on French territory, which was about the same as that of 6 years earlier. Belgian Congo produced 8 percent of the 1929-30 crop against 4 percent in the earlier season, while Portuguese Africa contributed 3 percent in 1929-30, a slight increase. Italian territories have varied between 1 and 2 percent of the annual total. While percentage positions have shifted somewhat annually, the indicated order of national groups with respect to actual cotton produced has not changed since the present scale of production was attained in 1924-25.

a/ Prepared by John L. Stewart, Associate Agricultural Economist, Foreign Agricultural Service Division. Free use has been made of reports from Dr. C.C. Taylor, former American Agricultural Attaché at Pretoria, P.K. Norris, former American Cotton Specialist at Cairo, Egypt and from American Consular officers stationed in Africa. Egypt is not included, in view of the fact that that country does not come within the conception of colonial or Empire cotton producing areas.

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

British African countries

The total cotton crop in the several British African administrations reached a highpoint of about 393,000 bales of 478 pounds in 1931-32, largely as a result of a good crop in the Sudan. The former high point was 381,000 bales in 1928-29, but low yields in the Sudan and Uganda, the leading producing areas, reduced the total in the two succeeding years. The combined crop of those two areas in 1931-32 accounted for about 95 percent of the total British African crop against 73 percent in 1924-25. Eight years ago Uganda was the leading producer, accounting for 52 percent of the total British crop in 1924-25, with only 15 percent of the total being grown in the Sudan. In 1931-32, however, Sudan produced 54 percent of the total crop against 42 percent for Uganda.

The territory surrounding Lake Victoria is the leading British African cotton area south of the Anglo-Egyptian Sudan. The Lake Victoria country embraces the main cotton regions of Uganda, Tanganyika Territory and Kenya Colony. From 1924-25 to 1931-32, production in those regions accounted for from 65 percent to 45 percent of the cotton grown in the British territories under review. Of the Lake Victoria cotton, Uganda accounts for from 85 to 90 percent of the total reported crop. The Uganda output reached a peak of 171,000 bales in 1928-29, fell to 108,000 bales for 1929-30 and recovered to 163,000 bales in 1931-32. This latter movement is contrary to the prevailing tendency of the past two years in other producing areas in south and east Africa. The Uganda acreage for 1931-32 reached the record level of 866,000 acres against a pre-war area of about 58,000 acres. In Tanganyika Territory, cotton production has been declining since 1928-29, when about 28,000 bales were recorded. The 1931-32 figure was less than 9,000 bales. Kenya Colony, which has never reported as much as 2,000 bales, was down to 670 bales in 1930-31, but recovered to 1,452 bales in 1931-32.

In the whole Lake Victoria region, cotton is grown almost entirely by natives without European supervision. There are two rainy seasons, making two plantings possible. In practice, however, most of the cotton is planted in July and by September it is about 12 inches high. December is the critical period in crop development.

Anglo-Egyptian Sudan

The Sudan is second only to Egypt as an African cotton producing region. The 1931-32 crop reached the record total of 206,000 bales on an area of 336,000 acres, a much better yield than that of the two preceding seasons. In 1930-31, an area of 369,000 acres yielded only 106,000 bales, and the 1929-30 yields were not much better; the 1930-31 figures were the smallest since 1925-26. The good 1931-32 yield has renewed confidence in the productivity of the Sudan, but insects and disease, which cut down yields in 1929-30 and 1930-31, remain a formidable problem. Low prices paid for the 1931-32 cotton have been the leading actor in cutting the 1932-33

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

acreage down to 330,000 acres, according to recent reports of the seasons's first estimate. Last year the first estimate was 367,000 acres, but the final for the season stood at 336,000 acres. The Gazira region produces about 80 percent of the Sudan crop. Progress in that region, therefore, tells the story of cotton in the Sudan.

In the past, insects and diseases have so cut down yields in the Gazira as to seriously reduce returns to the farmer even in times of high prices. In 1929-30 and 1930-31, such conditions were particularly bad. "Black Arm" has been a prevalent disease for several years. A considerable amount of control research suggests the limited use of water in the early stages of plant growth. At present, however, "leaf curl" is the most serious disease, having spread over the entire area of the Gazira since 1924-25. Leaf curl is credited with causing most of the recent small yields. So far, no satisfactory control is available, but experiments suggest the elimination of cow-peas from the crop rotation. It is thought that the disease is carried by a white fly for which the cow-pea is a host. Cow-peas are important as a forage crop in Sudan. Among insect pests, pink boll worm is the most important, but can be controlled by treating seeds. Cotton thrips is a serious autumn pest. Locusts also are troublesome occasionally.

The Gazira cotton project is an immense irrigation scheme to produce Egyptian Sakellaridis cotton. The crop normally receives from 12 to 16 waterings during the season. The first one is heavy, thoroughly soaking the soil, but later waterings wet only the surface soil. Fifteen days usually intervene between waterings. The best date for planting is placed at around August 20, with about a 10-day margin either way. No water is applied after April 15. The land is watered before planting and seeds are planted by hand on ridges made by steam plows. Usually the seed used is developed in the region, but for the 1931-32 crop seed direct from Egypt was used in view of the strong infestation of leaf curl and other diseases in Sudan-grown seed. The picking season usually starts around Christmas. Practically all of the cultivating is done with hand hoes, and picking is of course a hand labor job.

The Gezira project is a joint enterprise of the Sudan government and the Sudan Plantations Syndicate, with its subsidiary, the Kassala Cotton Company. As early as 1904 there was interest displayed in the Gezira area as a cotton producer, and in 1913 the Syndicate, then operating on the banks of the Nile, became interested. Early in 1913 the British government offered to finance the Sudan government efforts to develop cotton growing. The main feature was a dam across the Blue Nile about 170 miles from Khartoum, to provide gravity irrigation for the Gezira. The dam was finally completed in time to water the 1925-26 crop. It was in that year that total Gezira cotton area jumped to 83,000 acres, nearly four times larger than the 1924-25 acreage. The 1912-13 area was 633 acres. In 1931-32, acreage stood at 201,000 acres. The government's agreement with the Syndicate for the operation of the area covers a period of 40 years.

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

During the period of the agreement, the government, in addition to having built the dam and main irrigation canals, is to maintain and operate those works. The Syndicate builds the smaller canals, supervises the native cotton grower and handles all administrative and marketing work. The natives provide the labor and produce the crop. Any profits from the sale of the crop are divided 35 percent to the government, 25 percent to the Syndicate and 40 percent to the grower. Until last year, the Syndicate paid dividends. Up to the last few years, the project has been regarded as one largely embracing engineering problems. With yields cut down by disease, however, an increasing amount of attention has been given the problems of production technique. The important position of the Gezira scheme in the government financial structure assures every effort being made to produce at a profit. Yields have never reached the point hoped for by the Syndicate. Aside from the addition of new acreage annually, the yields per acre have been falling fairly steadily in recent years, with the exception of 1931-32.

Nearly equal areas of the Sudan are devoted to rain grown and flood grown cotton. These two forms of production account practically for all of the cotton lands outside of the Gezira. In all areas not covered by the Sudan Plantations Syndicate the government handles the marketing of the crop. Most of the rain grown cotton is American Upland, probably originally the Columbia strain, but grown in the Sudan for many years. In the flood cotton areas, a good product is secured, and pests and disease are held down by the annual soil renewal, but the lands available are limited in extent. Sakel-laridis is the cotton grown in the flood areas. Great Britain takes the largest share of the Sudan cotton exports, with British India next, and a few scattering exports to continental Europe.

Uganda

In Uganda over 80 percent of the cotton crop is ginned and prepared for market by East Indian interests, who export most of that quantity to India. The trade is controlled by the East African Cotton Merchants Association of Bombay, which owns over 80 percent of the gins in Uganda. The association asserts that there is no India-produced cotton equal in spinning value to the East African product. The first cotton gin in Uganda was built in 1906 at Kampala. From the start, Indian traders have handled the details of getting the crop marketed. Until 1917 almost the only market for Uganda cotton was Liverpool, but Bombay has assumed first place, with Japan also taking a share of the crop.

By July 1932, the heavy decline in cotton prices had seriously reduced the profits obtainable in all branches of the industry. Recent price figures for Uganda cotton are not available, but in 1927 growers were receiving from 2.9 cents to 4.1 cents per pound from ginner for seed cotton. In 1928 the prices ranged from 4.1 to 5.9 cents, and in 1929, from 2.7 to 5.4 cents. These prices were, in some cases, somewhat lower than it is calculated might

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

have been paid considering the American Middling price on the Liverpool market and the prevailing premiums. During the years indicated, ginneries were getting from 716 cents to 14.4 cents per pound of lint to cover buying expenses, ginning, pressing, baling, overhead, transport to tidewater, cotton tax, ship freight and overseas selling charges. Statutes have been proposed to protect the interests of producers. The proposals include price control, limitation of ginning facilities, and more education for native growers.

Tanganyika Territory

As far back as 1930, it was officially stated that cotton production in Tanganyika Territory was not making headway. The sluggishness was attributed to the low prices then prevailing, and to loss of interest among the natives. The local Department of Agriculture holds that, in general, estate-grown cotton is less carefully handled on the basis of quality than is native-grown cotton, and that therefore, reduced native interest has lowered somewhat the quality of cotton offered for export. The greater part of the crop is grown either on the eastern sea coast or in the Lake Victoria region. Most of the estate cotton is grown as an inter-planted crop with young sisal. Most of the native grown cotton is found in the Lake Victoria region. Minimum prices to be paid for native grown cotton are set by the Territorial Department of Agriculture. The prices are on a sliding scale based on Liverpool 4 month's futures prices, plus transport costs on lint from the gin to the coast. In 1930 first quality seed cotton was bringing from 2.5 to 3.3 cents per pound against 4.4 cents to 5.2 cents in 1929. Later price figures are not available.

Government experiments have indicated January or early February as the best time for planting cotton in Tanganyika. Plants then flower immediately after the long rains. This is conducive to both high yields and high quality. In all cases, cotton planted late gave poor yields. Insects and rodents have been responsible for heavy damage to cotton in recent years. Uganda Upland is the type of cotton most commonly grown. The U4 jassid-resistant variety has been introduced from the Union of South Africa, with considerable success. Jassid is a leaf-hopper. The U4 strain has been developed with hairy leaves, which resist the attack of the insect.

Kenya Colony

Practically all of the commercial cotton crop of Kenya Colony, the third producer in the Lake Victoria area, is grown by natives. The European-grown crop is too small for separate tabulation in production figures. Kenya cotton, however, is not yet important as an article of commerce. In 1931, a fairly large crop provided total exports equivalent to 4,013 bales of lint weighing 478 pounds net each, and valued at \$33,059. Of that total, it is estimated that the native cotton accounted for exports valued at \$31,629. It is anticipated that the 1933 crop will turn out somewhat smaller than that of 1931.

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

An unusual form of damage is reported from Kenya as a result of raids by baboons and wild pigs. In the area adjoining Lake Victoria, however, drought reduced crop prospects materially.

Like other areas of the Lake Victoria region, Kenya is an equatorial country without distinct winter and summer seasons. The seasons are designated as the long rainy season and the short rainy season. The long rains start with the March equinox which follows the hot season of December to March. The long rains last until the end of May. The short rains usually start about the end of October and continue through December. From May to October there is a cool period of cloudy days with occasional morning mists, but seldom any rain. In September, just preceding the short rains, warm weather again prevails. September is a critical month for the growing of crops. Cotton picking begins in November and buying from the natives continues from November to January, during the hot season.

Union of South Africa

From the end of the war to 1930-31, the Union of South Africa was fourth among the British African countries in cotton production. In the year indicated, however, the crop of less than 7,000 bales was the smallest since 1922-23, and Nyasaland moved into fourth position. The Union crop of 1931-32 was even smaller, being under 3,000 bales. Planting of the crop was delayed by lack of rain. Cotton cannot be planted in the Union until after the first heavy summer rains, which this year did not come until early November. As a result, it was too late to plant cotton in extensive areas without running the risk of frost at the end of the season. Low prices also helped to reduce the 1931-32 crop about 60 percent below 1930 - 31 by cutting down the acreage planted. Little, if any, increases in production are expected for 1932-33. Reports indicate the withholding of cotton from the gins in view of the low price obtainable. Exports in 1932 have run below 1931 figures as a result.

Stocks of Union and Swaziland cotton on hand July 31, 1932 were placed at 1,200 bales against 1,193 bales a year earlier. Indications are that the 1932 stocks have increased since the date named. The price of lint early in November was about 7 cents per pound, which is not regarded as encouraging either for marketing or for planting a new crop. Some growers who produce cotton in connection with cattle ranching will continue to grow some cotton for the seed to be used for feed. Growers using irrigation obtain the best yields and quality, but at the price indicated there was a net return to growers of only about 2 cents per pound of seed cotton after meeting all charges. Only the best grades have been ginned. Looking ahead several years and assuming complete success of the efforts of the Empire Cotton Growing Corporation in matters of variety improvement, disease

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

and pest control, etc., the Union and Swaziland could produce 25,000 to 50,000 bales in favorable years when prices are attractive, according to official observers. The largest crop recorded is that of about 17,000 bales in 1925-26.

Cotton is normally planted in the Union in October and November, and outside the irrigated areas delayed rains have serious effects upon the crop. On the irrigated areas, interest in cotton is more sustained than elsewhere, and accounts for about 1/3 of the Union crop. A jassid-resistant Improved Bancroft cotton is commonly used under irrigation, and yields up to 4,000 pounds of seed cotton per acre have been secured, giving from 1,100 to 1,200 pounds of lint, but the average is considerably lower. Ginning is done at Johannesburg or Durban, there being no local demand for the seed. The irrigated farms are in small holdings on deep, sandy loam with good drainage. Heavy fertilization is avoided in order to prevent heavy plant growth at the expense of lint. Phosphorus is most frequently the deficient plant food element. From 200 to 300 pounds per acre of super-phosphate are commonly applied, except when a drill is used, when the quantity is reduced. Nitrogen is commonly secured by plowing in legumes. Animal manures are sometimes used in conjunction with super-phosphate.

Ginned cotton is packed in neat bales measuring 54 x 27 x 20 inches and weighing about 500 pounds. Since 1923, official grading has been required for all cotton going into export trade, which means practically all of the crop. The Government cotton grader collects a fee of 24 cents per bale. It appears that most Union cotton is from 1 inch to 1.25 inches in staple length. It appears also that in 1929-30, 61.5 percent of the export cotton was classed as middling or better and of good color. The average quality of that crop, however, was higher than in the preceding four years, when the crops graded from 40 to 50 percent middling or better. The Union Government collects a levy of 24 cents per 100 pounds of lint cotton or 300 pounds of seed cotton offered for export, the levy being collected by the government grader. The money is spent for promotion of the cotton industry. Lack of moisture and insects are important limiting factors in the Union cotton production industry. The Union has recently acquired the first unit of a cotton textile industry. At Johannesburg a new enterprise covering both spinning and weaving has just been completed. It is to employ 500 Europeans besides many natives.

Southern Rhodesia

In Southern Rhodesia, cotton production exceeded 5,000 bales in 1925-26 but declined sharply in the following 2 seasons. Since the year cited, production has not yet recovered to 2,000 bales, the 1931-32 figure being 1,046 bales, a decline below the preceding year. From the long-time viewpoint, however, Southern Rhodesia must be regarded as a region of moderately increasing cotton supplies. Efforts made by the Empire Cotton Growing Corporation in insect and disease control appear to be having an effect. Despite low prices, cotton is reported as making returns which compare favorably with those of other agricultural enterprises. Quality has improved, and the handling and grading done by the cooperative gins has earned official commendation.

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

Improved technique has raised the level of yields, which formerly were so low as to discourage continued production. The 5,000-odd bales grown in 1925-26 took 66,000 acres to produce. The recent development of the Jassid-resistant U4 variety of cotton has been a leading factor in renewing interest in cotton.

Planting is done in late October or early November even if the summer rains have not begun, and fields are replanted in the event of poor germination. The plants are left about 6 inches apart in the row. From 25 to 30 pounds per acre are drilled in, or 6 or 7 seeds per hill when planted by hand. Experiments indicate that little result is gained from fertilizing the growing crop, although it may be applied profitably with another crop immediately preceding cotton. Green manures grow too rank in rainy years. The cotton crop is cultivated from 4 to 6 times. Picking begins about May 1, although early cotton may mature during April, even before the end of the summer rainy season. Pickers gather from 40 to 60 pounds per day. Ratooning cotton is becoming more general in view of the lower production costs. It matures earlier, but attracts boll worms and stainers sooner than does seed cotton, causing heavy infestation of the latter. The Empire Cotton Growing Corporation is pushing cotton in Southern Rhodesia. Limiting factors seem to be low prices, cotton boll worm and drought.

French Africa

Cotton production in those French African possessions for which statistics are regularly available reached a peak of 52,827 bales of 478 pounds net in the season 1929-30. That total does not include figures for French Equatorial Africa which, according to American consular advices, exported 20,602 bales in 1930. Of the eight administrative regions whose figures are included in the above 1929-30 total production figure, Ivory Coast was the leader, with 9,751 bales. Next came Dahomey, with 9,516 bales. The third 1929-30 region was French Sudan with 9,501 bales. Production in Dahomey and Ivory Coast declined in 1930-31, but French Sudan advanced to 12,637 bales. In the other five summarized areas, production also declined. In 1931, cotton exports from French Equatorial Africa were down to 10,000 bales, according to consular figures.

France promoted cotton vigorously in all African colonies in post-war years, with the output advancing up to 1925-26 and 1926-27. In the latter year, production in certain important areas declined sharply, the decline being carried further in 1927-28 for a larger number of colonies. An upward movement began in 1928-29, however, which carried the colonial total in 1929-30 above the former peak of 1925-26. In French Equatorial Africa, present activities in cotton are dominated by four plantation companies, who recently signed an agreement with the government to cooperate in improving research in cultivation, soils, fertilizer, etc. Advanced work also is being

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

provided for young natives at governmental experiment stations. The reduced cotton prices of the past two years, however, have discouraged interest in cotton in French Equatorial Africa as well as in all other French African possessions.

Algeria

Algeria is not the most important French African source of cotton, but its proximity to France has favored the marketing of the crop. In 1926-27, the peak year of post-war production, the crop reached only 7,939 bales of 478 pounds net. By 1931-32, production was down to less than 1,500 bales. Reports indicate that low prices and a heavy attack of pink boll worm were largely responsible for the decline in 1931-32. In fact, a temporary cessation of cotton culture in Algeria has been suggested officially. The 1931-32 acreage is placed at only 3,000 acres against nearly 22,000 acres in 1926-27. Practically all Algerian cotton is exported to France, there being no spinning mills in the colony. England takes some cotton and most of the seed exports.

Cotton planting in Algeria usually starts in the first half of April after plowing to a depth of 14 inches and cross-plowing for 10 inches. The fields are usually fertilized between plowings. This occurs in the winter, which is the rainy season. Stable manure, when available, is used at the rate of 11,000 to 13,000 pounds per acre. Otherwise, green manures are plowed under during February and March. A limited amount of commercial fertilizer is used. Most of the crop is grown under irrigation. When so grown, the rows are about 4 feet apart with seed planted 14 inches apart in the row after soaking the fields. There are 2 to 7 plants in each seed hole. After seeding, the fields are covered with water to half the height of the planted ridges. The amount of water required during the growing season is largely governed by the cultivator's judgment. The cotton usually ripens in September and is picked from late in that month through December. Pickers, usually old women and children, are paid less than 1 cent per pound, picking an average of only 22 to 33 pounds daily.

Production costs are placed at about 4 cents per pound of fibre, or \$40.50 per acre. The better yields secured by hand cultivation and picking are said to offset the lower cost per acre resulting from machine cultivating. In August 1933 there were 114 gins and 16 presses at work in Algeria, but those numbers have been reduced during the past year. A large share of the crop is handled by cooperatives, which gin and sell the cotton. If, however, the cultivator takes his cotton direct to a gin, he sells it there to a French buyer. Ginning costs in 1931 averaged about 1 cent per pound of lint, including storage and handling charges. The average Algerian bale measures 35 x 35.5 x 27.5 inches and weighs 617 pounds gross and 606 pounds net. On January 1, 1931, the use of Alexandria prices as a marketing basis was abandoned and a Liverpool basis substituted. Algeria has no good grading or classing system, but the product is well known by French spinners.

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

Cotton is an ancient plant in Algeria. Sakel strains grow well, as does the American Yuma. The hybrid Orleanville also is important. French farmers in Algeria became interested in cotton as early as 1839. Progress was slow until the American Civil War, when Algeria had about 17,000 acres in cotton. By 1890, cotton was all but abandoned, but recovered somewhat in 1904. The last peak to be reached was the 22,000 acres registered in 1926-27. At present, no official support is being given cotton culture in Algeria.

Belgian Congo

The Belgian Congo is one of the more important cotton producing areas of Africa, with the 1931-32 crop reaching nearly 67,000 bales. Yields are fairly high, the 1929-30 crop of 34,000 bales having been raised on a reported area of 31,383 acres. The cotton enterprise has advanced to above mentioned figures from a level of 4,521 bales from 8,649 acres in 1921-22. Dry cultivation, as in the United States, is the common method of production in the Congo. Cotton ranks ahead of a number of agricultural exports important in the Congo trade.

Portuguese Africa

Cotton production in the Portuguese African colonies of Mozambique and Angola reached its peak in the 1926-27 season when 15,728 bales of 478 pounds resulted from the combined crops. In 1929-30, the last year for which figures are available, production was down to 12,503 bales. The Mozambique crop hovered near 12,000 bales for the three years 1926-27 to 1928-29 but was down to little more than 9,000 bales in 1929-30. It was reported in January 1932 that no material expansion of cotton production may be expected for Mozambique under prevailing conditions of low prices and low yields. Attempts to grow cotton have been made there since 1900, using Egyptian, Sea Island and Upland varieties. The principal export was made between 1923 and 1926. In general, however, and especially since 1926, yields have been too low to be profitable. The best yield recorded was 257 pounds of lint per acre, most fields yielding 100 to 126 pounds per acre. If such yields are unprofitable at 20 cents per pound, there is little possibility of a profit at present prices.

Irregular rainfall results in lack of uniformity in staple length, which reacts unfavorably on the market value. Damage from disease and insects has aided in reducing production. The principal pests are American boll worm, spiny boll worm, Sudan boll worm, cotton stainers, jassid and stalk borer. Bacterial blight and anthracnose also cause serious damage. The river valley soils are usually good cotton land. On the uplands, the soil situation is usually acceptable when the rainfall is well distributed, but depth is lacking and fertility declines rapidly under cultivation. Labor is cheap and abundant, but careless and unreliable.

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D

Great Britain is the leading buyer of Mozambique cotton. In 1931 Portugal ranked fifth after Britain, Belgium, Germany and France in the purchase of cotton from her colony. Last June, Portugal announced a system of export bounties on colonial cotton shipped to the mother country, the bounty to come out of an import duty on foreign cotton imported into Portuguese territory. The bounty is to be paid during the fiscal years ended June 30, 1933 and 1934. Apparently there is some doubt among the colonial business men respecting the closer commercial relations with Portugal that the bounty entails, in view of the extensive business already organized with other countries. It is pointed out also that an extensive increase in Mozambique cotton cultivation brings on more regular water supply through irrigation. The irrigation projects now under way, it is stated, cannot be completed within the time set for bounty payments.

Cotton production in Mozambique is almost entirely a post-war development, influenced to a considerable extent by the activities of the British Empire Cotton Growing Corporation in nearby British territories. The greater part of the commercial crop is produced by a few large European-owned estates which grow cotton in conjunction with other crops. Independent native cultivation continues on a relatively small scale. The Mozambique cotton season runs from November to October, the crop being picked from April to June. Under irrigation, a second crop can be secured in August - September. Native women and children do most of the cotton picking, harvesting from 22 to 55 pounds per day. Principal varieties grown are: Allen's Long Staple, Nyasaland Upland, and a local variety. Nyasaland Upland is a cross of Allen's Long and Egyptian, the former being a strain developed in the United States. Most of the estate cotton is usually sold direct to Liverpool.

Italian Africa

Cotton production in Eritrea and Italian Somaliland reached a 1931-32 total of 7,141 bales of 478 pounds net against 4,704 bales in 1930-31. Production in both colonies was encouraged following the war, to reach a peak for Somaliland of 5,809 bales in 1928-29 and for Eritrea of 2,767 bales in 1926-27. In Somaliland, cotton is the leading export commodity. In 1929 cotton represented 26 percent of the total value of all exports, and 14 percent in 1930. Italy takes practically all of the cotton exports, with a little going to Great Britain. The type most commonly grown is the Egyptian Sakel. A few commercial companies control most of the cotton production in the colony. An unusually low proportion of the 1931-32 crop was sold by September 1932. In Eritrea also, Sakel is the common type grown. One commercial organization, with land lying near the Anglo-Egyptian Sudan, produces most of the export cotton. There is a small amount of independent native production for home use. As in Somaliland, a smaller proportion than usual was exported from the 1931-32 crop. Several years ago, about the time of the post-war production peak, there was considerable interest aroused regarding the future of cotton in Eritrea, but no substantial developments have resulted.

THE PROGRESS OF COLONIAL COTTON IN AFRICA, CONT'D.

COTTON: Production in African Colonial territories, average,
1909-10 to 1913-14, annual 1924-25 to 1931-32
(In bales of 478 pounds net).

Country	Average 1909-10 to 1913-14	1924-25	1925-26	1926-27	1927-28	1928-29	1929-30	1930-31	1931-32
	Bales	Bales	Bales	Bales	Bales	Bales	Bales	Bales	Bales
British Africa									
Sudan.....	14,455	40,665	106,460	131,007	111,222	142,191	139,200	106,471	205,991
Lake Victoria Area									
Uganda.....	20,338	164,046	151,344	110,231	115,885	170,757	108,051	132,000	168,000
Tanganyika...	7,971	15,726	18,179	20,318	13,360	27,576	23,251	13,360	8,970
Kenya Colony	552	1,885	1,749	778	1,039	1,660	1,270	670	1,452
Total L.Vic.	28,861	181,655	171,272	131,327	130,285	199,982	132,572	178,030	178,422
Nigeria.....	8,072	32,750	40,091	22,932	17,515	26,883	36,757	15,433	5,144
U.of So.Afr.	76	14,172	17,056	8,571	9,213	8,179	13,567	6,783	2,342
Nyasaland....	4,603	5,538	6,457	4,165	2,336	3,740	5,407	8,285	---
So.Rhodesia	---	4,923	5,497	489	76	240	1,255	1,813	1,046
No.Rhodesia	307	409	414	80	44	52	41	53	---
Total British		260,114	347,249	293,551	271,294	331,273	328,799	316,593	392,945
French Africa									
Dahomey	364	3,943	6,549	4,718	3,445	7,490	9,516	3,327	---
Ivory Coast..	---	3,727	6,314	6,730	7,127	6,309	9,751	6,402	5,406
French Sudan	---	7,462	6,065	5,358	9,409	9,501	9,501	12,377	---
Upper Volta	---	10,972	12,683	2,906	3,599	3,816	5,876	4,441	---
Niger ter.	---	2,740	2,767	2,737	692	1,441	1,133	1,911	---
Algeria.....	1,370	2,387	5,583	7,939	3,401	6,288	7,789	5,353	1,349
French Togo	2,463	7,388	5,677	7,361	7,084	9,432	8,205	6,547	---
Senegal.....	---	1,843	1,605	2,639	2,306	1,499	436	326	404
Total French		40,484	47,243	40,608	37,063	47,776	52,827	42,443	---
Belgian Congo	---	13,236	16,142	22,539	27,557	30,867	33,903	36,986	---
Portuguese Afr									
Mozambique..	388	2,496	2,230	11,752	11,956	12,505	9,175	---	---
Angola.....	510	3,067	2,753	5,776	2,012	1,992	3,323	---	---
Total Portu- guese.....	4,398	5,563	4,983	15,728	13,968	14,497	12,503	---	---
Italian Africa									
Ital. Somali	510	2,305	2,537	2,737	3,529	5,803	5,083	3,452	5,435
Eritrea.....	948	2,767	1,845	2,737	1,384	1,061	1,061	1,245	1,706
Total Ital.	1,458	5,072	4,382	5,534	5,212	6,870	6,144	4,704	7,141
GRAND TOTAL	---	346,049	420,004	382,940	355,094	481,287	434,179	430,727	---

Official sources.

WHEAT: Production in specified countries, 1931-1933

Country	1931	1932	1933
	<u>1,000 bushels</u>	<u>1,000 bushels</u>	<u>1,000 bushels</u>
United States.....	900,219	726,000	496,000
Mexico	16,226	9,658	11,746
Spain.....	134,426	184,209	128,602
Bulgaria.....	61,195	50,553	52,139
Portugal.....	12,999	18,138	12,860
Finland.....	1,161	1,260	1,506
Algeria.....	25,649	29,237	28,109
Morocco.....	21,972	27,970	25,720
Tunis.....	13,963	17,453	10,288
Egypt.....	46,072	52,586	39,940
India.....	345,296	339,621	347,162
Japan.....	30,892	31,336	40,472
Rumania.....	135,299	55,536	94,798
Germany.....	155,545	183,827	185,921
Hungary.....	72,550	64,462	75,289
Netherlands.....	6,751	13,694	14,183
Turkey.....	102,426	69,344	80,835
Total	2,082,641	1,874,884	1,645,570

Official sources.

WHEAT: Estimated production in 19 countries of continental Europe, excluding Danube surplus regions, 1928-1933

Country	Average 1928-1932	1932	1933
	<u>1,000 bushels</u>	<u>1,000 bushels</u>	<u>1,000 bushels</u>
Germany.....	143,627	183,827	174,751
Italy.....	243,939	276,126	251,288
France.....	288,435	331,351	287,223
Belgium.....	14,587	15,359	13,779
Netherlands	7,863	13,705	14,036
Czechoslovakia.....	50,265	53,719	55,593
Switzerland.....	5,658	5,658	5,695
Greece.....	11,905	16,975	14,991
Austria.....	12,125	13,007	12,934
Denmark.....	10,986	10,656	9,921
Poland.....	68,012	49,457	72,825
Sweden.....	20,613	26,492	22,340
Norway.....	735	772	698
Finland.....	1,139	1,249	1,066
Latvia.....	3,527	5,291	4,666
Estonia.....	1,543	2,094	1,947
Lithuania.....	8,929	9,370	8,745
Spain.....	149,619	184,194	141,241
Portugal.....	12,676	18,151	13,632
Total.....	1,061,183	1,217,453	1,107,371

Estimated by Berlin office of Foreign Agricultural Service.

WHEAT: Closing prices of September futures a/

Date	Chicago		Kansas City		Minneapolis		Winnipeg <u>b/</u>		Liverpool <u>b/</u>		Buenos Aires <u>c/</u>	
	1932	1933	1932	1933	1932	1933	1932	1933	1932	1933	1932	1933
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Apr. 24) <u>d/</u>	63	83	58	75	64	80	60	64	63	68	e/51	e/50
June 23)	50	67	43	61	50	65	49	51	52	58	e/45	e/46
July 24	51	87	44	82	51	83	49	65	53	68	e/47	e/52
1	50	97	44	93	50	94	49	69	52	72	e/45	e/55
8	51	102	44	96	49	100	50	81	53	81	e/46	e/62
15	47	116	41	111	46	114	48	91	52	85	45	67

a/ October futures for Winnipeg and Liverpool. b/ Conversions at noon buying rate of exchange. c/ Prices are of day previous to other prices. d/ High and low for period (Apr. 24 - June 23, 1933) (Apr. 25 - June 24, 1932). e/ August futures.

WHEAT: Weighted average cash price at stated markets

Week ended	All classes and grades six markets		No. 2 Hard Winter Kansas City		No. 1 Dr.N.Spring Minneapolis		No. 2 Amber Durum Minneapolis		No. 2 Red Winter St. Louis		Western White Seattle <u>a/</u>	
	1932	1933	1932	1933	1932	1933	1932	1933	1932	1933	1932	1933
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Apr. 29) <u>b/</u>	64	74	57	72	74	77	69	78	58	82	67	64
June 17)	54	71	46	66	63	73	56	68	49	75	54	59
24	49	77	43	75	61	81	55	73	47	77	54	62
July 1	49	93	43	91	62	97	55	91	47	93	53	73
8	47	99	45	98	65	105	54	103	48	99	52	77
15	47	104	45	102	62	113	52	115	47	107	51	

a/ Weekly average of daily cash quotations, basis No. 1 sacked 30 days delivery.
b/ High and low for period (April 29-June 17, 1932 and 1933).

WHEAT: Area and production, Australia, 1928-29 to 1933-34

Crop year	Area	Production	Yield per acre
	1,000 acres	1,000 acres	Bushels
1928-29	14,840	159,679	10.9
1929-30	14,977	126,885	8.5
1930-31	18,165	213,594	11.8
1931-32	14,741	190,612	12.9
1932-33	15,171	216,238	14.3
1933-34	14,500		

FEED GRAINS AND RYE: Weekly average price per bushel of corn, rye, oats and barley at leading markets a/

Week ended	Corn						Rye		Oats		Barley	
	Chicago			Buenos Aires			Minneapolis		Chicago		Minneapolis	
	No. 3 Yellow	Futures		Futures			No. 2		No. 3 White		Special No. 2	
	1932	1933	1932	1933	1932	1933	1932	1933	1932	1933	1932	1933
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High b/ ...	38	52	33	68	32	39	50	97	25	45	54	67
Low b/ ...	30	22	29	45	30	31	31	32	19	15	31	24
			July	July	Aug.	Aug.						
June 17 ...	31	41	30	45	31	31	33	58	21	28	36	38
24 ...	31	44	30	48	31	32	32	66	21	33	35	45
July 1 ...	30	50	29	53	31	34	32	78	19	41	34	58
8 ...	30	57	29	60	31	37	32	81	20	45	35	64
			Sept.	Sept.	Sept.	Sept.						
15 ...	32	62	32	68	32	39	31	97	20	45	31	67

a/ Cash prices are weighted averages of reported sales; future prices are simple averages of daily quotations. b/ For period January 1 to latest date shown.

FEED GRAINS: Movement from principal exporting countries

Item	Exports for year		Shipments 1933, week ended a/			Exports as far as reported		
	1931-32	1932-33	July 1	July 8	July 15	July 1 to and incl.	1932-33	1933-34
	b/	b/	b/	b/	b/	b/	b/	b/
BARLEY, EXPORTS: c/	1,000	1,000	1,000	1,000	1,000		1,000	1,000
United States	5,084	9,408	323	179	67	July 15	347	246
Canada	14,505	6,750						
Argentina	13,822	16,861	d/	542	d/	542	d/	620
Danube countries d/	29,653	21,537	265	157	305	July 15	859	462
Total	63,064	54,556					1,252	1,870
OATS, EXPORTS: c/								
United States	4,437	5,268	3	10	9	July 15	129	19
Canada	17,397	13,972						
Argentina	52,173	52,325	d/	185	d/	497	d/	482
Danube countries d/	947	892	0	0	0	July 15	10	0
Total	74,954	52,437					1,968	998
CORN, EXPORTS: c/	1930-31	1931-32				f/	1931-32	1932-33
United States	3,079	6,095	115	780	175	July 15	2,880	6,416
Danube countries d/	15,849	38,374	1,190	1,131	1,369	July 15	27,792	59,684
Argentina	355,367	315,391	d/3,256	d/5,068	d/3,622	July 15	238,656	122,790
Union of South Africa g/	3,143	16,071	0	0	34	July 15	7,980	11,170
Total	382,438	375,931					277,508	200,060
United States imports	928	393					Nov. May	Nov. May
							284	100

Compiled from official and trade sources. a/ The weeks shown in these columns are nearest to the date shown. b/ Preliminary. c/ Year beginning July 1. d/ Trade sources. e/ Year beginning November 1. f/ November 1 to and including. g/ Unofficial reports of exports to Europe from South and East Africa.

GRAIN: Production, Germany, 1928-29 to 1933-34

Crop year	Wheat	Rye	Barley	Oats
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
1928-29	141,593	335,499	153,721	481,950
1929-30	123,062	321,045	146,089	503,633
1930-31	139,217	302,312	131,369	389,688
1931-32	155,546	262,977	138,622	427,479
1932-33	183,830	329,255	147,647	458,160
1933-34	185,995	324,312	145,550	424,730

International Institute of Agriculture

GRAIN: Production in Hungary, 1928-29 to 1933-34

Crop year	Wheat	Rye	Barley	Oats
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
1928-29	99,211	32,587	30,671	27,529
1929-30	74,983	31,423	31,352	28,292
1930-31	84,339	28,406	27,605	19,998
1931-32	72,550	21,672	21,267	13,368
1932-33	64,463	30,300	33,029	21,756
1933-34	75,287	33,778	31,003	19,221

International Institute of Agriculture

DRIED FRUIT: Production, Mediterranean Basin, 1932 and 1933

Fruit and region	1932	1933
	Short tons	Short tons
<u>Raisins</u>		
<u>Spain</u>		
Valencias.....	9,300	6,500
Malagas.....	11,000	7,700
Total.....	20,300	14,200
<u>Smyrna</u>		
Sultanas.....	70,000	60,000
<u>Greece</u>		
Sultanas and Rosakias.....	27,000	28,500
Total raisins...	117,300	102,700
<u>Currents, Greece</u>	144,000	139,000
<u>Figs, Smyrna</u>	31,000	25,000

Agricultural Commissioner Nielsen, Marseille, France.

GRAINS: Exports from the United States, July 1- July 8, 1932-33 & 1933-34

PORK: Exports from the United States, Jan. 1- July 8, 1932 & 1933

Commodity	July 1-July 8		Week ending			
	1932	1933	July 8			
	1,000	1,000	1,000			
	bushels	bushels	bushels			
GRAINS:						
Wheat <u>a/</u>	270	2	2			
Wheat flour <u>b/</u>	113	212	212			
Rye	167	--	--			
Corn.....	188	780	780			
Oats	91	10	10			
Barley <u>a/</u>	25	179	179			
	Jan. 1	July 8				
	1932	1933				
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
PORK:						
Hams and shoulders, incl.						
Wiltshire sides.....	32,852	39,209	1,383	3,686	2,024	1,686
Bacon, incl. Cumberland						
sides.....	10,180	9,038	353	585	486	182
Lard.....	300,962	314,326	6,518	12,166	4,802	5,518
Pickled pork.....	7,751	6,135	163	91	13	203

Division of Statistical and Historical Research. Source: Official records - Bureau of Foreign and Domestic Commerce. a/ Included this week: Pacific ports wheat 2,000 bushels, flour 18,900 barrels, from San Francisco, barley 174,000 bushels, rice 3,280,000 pounds. b/ Includes flour milled in bond from Canadian wheat, in terms of wheat.

Wheat, including flour: Shipments from principal exporting countries as given by current trade sources, 1931-32 and 1932-33

Country	Total shipments		Shipments, weeks ended			Shipments	
	1931-32	1932-33	June 24	July 1	July 8	July 2 - 1932	July 8 1933
		Prel.					
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	bushels	bushels	bushels	bushels
North America <u>a/</u>	333,638	298,437	4,504	3,859	4,317	5,888	4,317
Canada, 4 markets <u>b/</u>	206,258	289,257	4,503	4,156	4,437	7,661	4,437
United States <u>c/</u>	135,804	40,853	257	203	214	383	214
Argentina.....	144,572	115,409	4,424	2,149	3,922	1,980	3,922
Australia..	163,004	153,395	1,552	992	1,715	1,896	1,478
Russia <u>d/</u>	71,664	17,408	0	0	0	0	0
Danube & Bulgaria <u>d/</u> ..	39,280	1,704	0	0	0	16	0
British India..... <u>e/</u>	2,913	0	0	0	0	0	0
Total <u>e/</u>	755,071	586,353	10,480	7,000	9,954	9,780	9,717
Total European ship-							
ments <u>a/</u>	597,976	438,513	7,864	2,309		8,336	
Total ex-European							
shipments <u>a/</u>	194,464	163,816	2,272	1,505		2,256	

Division of Statistical and Historical Research. Compiled from official and trade sources. a/ Broomhall's Corn Trade News. b/ Fort William, Port Arthur, Vancouver, Prince Rupert and New Westminster. c/ Official. d/ Black Sea Shipments only. e/ Total of trade figures includes North America as reported by Broomhall's.

EXCHANGE RATES: Average daily, weekly and monthly values in New York of specified currencies, April-July, 1933 a/

Country	Monetary unit	Cent par	1933						
			Month			Week ended		Daily	
			Apr.	May	June	July 1	July 8	July 15	July 17
		Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Argentina <u>b/</u> ...	Peso.....	96.48	60.49	67.90	71.06	73.20	78.88	82.85	83.12
Canada.....	Dollars...	100.00	84.72	87.59	89.89	90.91	93.74	95.27	95.26
China <u>c/</u>	Shang.yuan: <u>d/</u>	<u>e/</u> 22.20	24.52	26.13	26.93	28.31	30.09	30.81	
Denmark.....	Krone.....	26.80	15.95	17.52	18.44	19.11	20.42	21.25	21.30
England.....	Pound.....	486.66	357.93	393.24	413.56	428.27	456.75	475.82	477.70
France.....	Franc.....	3.92	4.10	4.53	4.80	4.96	5.36	5.59	5.61
Germany.....	Reichsmark	23.82	24.39	27.36	28.81	29.98	32.55	34.55	34.18
Italy.....	Lira.....	5.26	5.57	6.09	6.38	6.65	7.26	7.57	7.56
Japan.....	Yen.....	49.85	22.09	24.00	25.76	26.74	28.31	29.46	29.68
Mexico.....	Peso.....	49.85	27.02	28.87	27.67	27.52	27.68	28.09	28.09
Netherlands.....	Guilder...	40.20	41.95	46.95	49.01	50.44	54.97	57.68	57.82
Norway.....	Krone.....	26.80	18.32	20.02	20.83	21.52	22.95	23.90	23.99
Spain.....	Peseta.....	19.30	8.88	9.99	10.56	10.58	11.45	11.94	11.95
Sweden.....	Krona.....	26.80	18.81	20.24	21.28	22.03	23.56	24.53	24.63

Federal Reserve Board. a/ Noon buying rates for cable transfers. b/ Quotations are for gold pesos, paper pesos (m/n) computed at 44 percent of gold exchange rate. c/ Shanghai yuan series started April 10. d/ Par varies with the price of silver in New York. e/ Average based on quotations from April 10 to end of month.

EUROPEAN LIVESTOCK AND MEAT MARKETS
(By weekly cable)

Market and item	Unit	Week ended		
		July 14, 1932 <u>a/</u>	July 6, 1933 <u>a/</u>	July 13, 1933 <u>a/</u>
GERMANY:				
Receipts of hogs, 14 markets.....	Number	56,716	54,737	55,912
Prices of hogs, Berlin.....	\$ per 100 lbs	8.21	9.78	9.87
Prices of lard, tcs. Hamburg.....	"	7.73	11.67	12.38
UNITED KINGDOM <u>b/</u> :				
Arrivals of continental bacon.....	Bales	90,010	67,730	71,467
Prices at Liverpool 1st. qual:				
American green bellies.....	\$ per 100 lbs	7.22	11.83	12.50
Danish green sides.....	"	8.88	14.71	15.89
Canadian green sides.....	"	9.20	11.57	11.79
American short green hams.....	"	12.85	16.65	17.09
American refined lard.....	"	7.30	8.50	9.13

Liverpool quotations are on the basis of sales from importers to wholesalers.

a/ Converted at current rate of exchange. b/ Week ended Friay.

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